



Requirements and Tracking for the USDA Purchase Card Annual Refresher Training

FY2018

Agenda

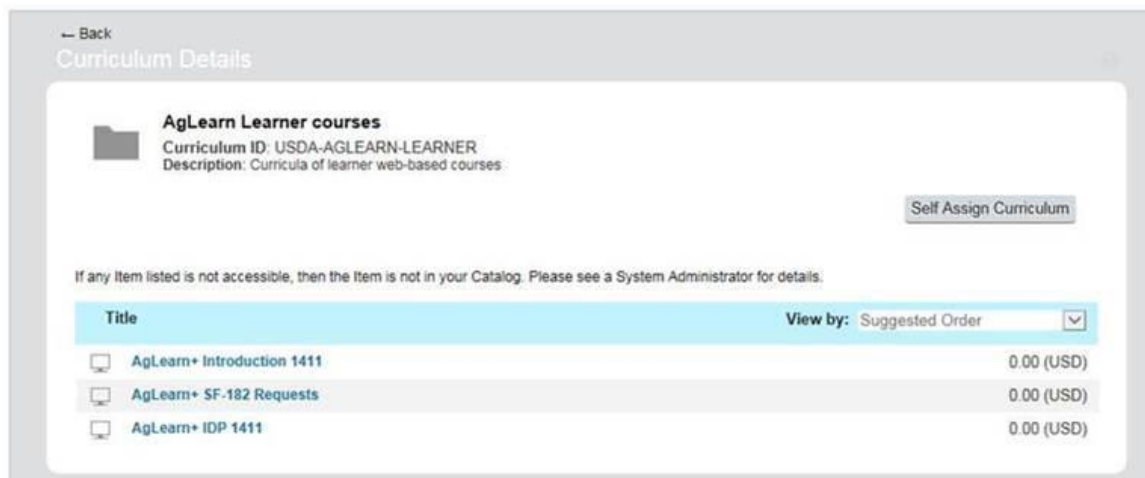
- Update
- Requirements
- Timeline
- Tracking
- Suspension Schedule
- Frequently Asked Questions



Update: AgLearn Curricula

AGLEARN REORGANIZATION OF TRAINING MATERIALS

- CCSC has implemented a new system for completing training requirements by grouping all the necessary trainings for Cardholders, Approving Officials and Coordinators.
- The trainings for each program category are now grouped into one folder where individuals can locate all trainings related to their specific work.
 - Each program participant will receive one certificate with a list of his or her completed trainings.



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Curriculum Details

AgLearn Learner courses
Curriculum ID: USDA-AGLEARN-LEARNER
Description: Curricula of learner web-based courses

Self Assign Curriculum

If any Item listed is not accessible, then the Item is not in your Catalog. Please see a System Administrator for details.

Title	View by: Suggested Order
AgLearn+ Introduction 1411	0.00 (USD)
AgLearn+ SF-182 Requests	0.00 (USD)
AgLearn+ IDP 1411	0.00 (USD)

Requirements

AGENCY PROGRAM COORDINATORS' (APCs) REQUIRED ACTION

- **Review** Procurement Advisory (PA) No. 125: United States Department of Agriculture (USDA) Purchase Card Program – Mandatory, Annual Refresher Training Requirements.
- **Educate** Coordinators, Approving Officials (AOs) and Cardholders immediately about the Mandatory, Annual USDA Purchase Card Program Refresher Training Requirements and Fiscal Year 18 (FY18) timeline.
- **Ensure** Coordinators, AOs and Cardholders complete the Mandatory Annual Refresher Training by the **March 31st deadline**.
- **Evaluate** the list of non-complying program participants by June 2018 to determine necessary action on July 2, 2018. This may include moving card account to **T9 status**, **placing** User IDs on “**To Be Removed**” status, or requiring the completion of the **initial training for continued program participation**.



Requirements

- All Coordinators, AOs and Cardholders **must complete** the **USDA Purchase Card Program Refresher Training** for their role(s) in **AgLearn** by **March 31, 2018**. The modules in AgLearn are listed below.
 - Cardholders: FY18 USDA Purchase Card Program Refresher Training for Cardholders (*Web Based DM-PC-CARDHOLDERS-2018*) * *FY18 USDA Purchase Card Program Refresher Training - Policy*
 - Approving Officials: FY18 USDA Purchase Card Program Refresher Training for Approving Officials (*Web Based DM-APPROVING-OFFICIALS-2018*) * *FY18 USDA Purchase Card Program Refresher Training - Policy*
 - Coordinators (APCs and LAPCs): FY18 USDA Purchase Card Program Coordinator Refresher Training for Coordinators (*Web Based DM-PC-COORDINATORS-2018*) * *FY18 USDA Purchase Card Program Refresher Training - Policy*



Important Note



- CCSC will inform all program participants as soon as the trainings are available.
- The refresher trainings will be assigned to each participant's AgLearn account.



Timeline

FY18 TIMELINE

- **March 31, 2018:** Coordinators, AOs and Cardholders must complete the USDA Purchase Card Refresher Training in [AgLearn](#).
- **May 14, 2018:** Charge Card Service Center (CCSC) will place a **R9 suspension** on Purchase Card accounts of Cardholders not meeting the March 31 deadline and will provide APCs with a list of their agency's non-complying Cardholders, AOs and Coordinators.
 - Only CCSC will activate cardholders' suspended accounts.
 - Cardholders' accounts will be active two to five days after CCSC's suspension lift request.
 - The suspension lift dates are on slide 13.
- **June 4, 2018:** CCSC will provide USDA senior leadership and each agency's Mission Area Senior Contracting Officer (MASCO) with a list of agency's program participants still not complying with training requirements.



Timeline

- **June 30, 2018:** Purchase Card Program participants who are still not in compliance by June 30 of each fiscal year will be required to successfully complete the entire complement of USDA Purchase Card Program training modules to continue participating in the Purchase Card Program.
 - Sections 5.1 – 5.4 of the [Coordinator's Purchase Card Program Guide](#) lists the initial trainings.
- **July 2, 2018:** APCs will take the appropriate action upon program participants who have outstanding FY18 refresher training.
 - APCs terminate the purchase card accounts of any cardholder who has outstanding refresher training and who should not remain as a program participant.
 - APCs place a “To Be Removed” status on the User ID of Approving Officials and Coordinators who have outstanding refresher training and who should not remain as a program participant.
 - APCs inform CCSC upon the completion of initial complement of training by a program participant who has outstanding training and who should continue program participation.



Tracking

ASSIGNING AND TRACKING TRAINING IN AGLEARN

- Applicable refresher training modules will be assigned in AgLearn to each Purchase Card Program participants will be assigned applicable refresher training modules in AgLearn based on their role. Deadlines for training completion will be assigned.
- Participants who have turned on notifications in AgLearn will receive an email when the training is assigned in AgLearn and reminder emails as the deadline approaches.
- APCs will receive a list of program participants who are required to complete the refresher training for the current fiscal year.
- The CCSC will provide APCs with periodic updates on program participant training completion.
- After the training deadline, APCs will receive a list of program participants who have failed to meet the training requirement by the deadline.



Tracking

DISTRIBUTION OF FY18 REFRESHER TRAINING COMPLIANCE REPORT

- Every Other Week: February, 2018 – March 2, 2018
- Weekly: March 5, 2018 – March 23, 2018
- Every Other Day: March 26, 2018 – March 30, 2018
- Weekly: April 2, 2018 – June 30, 2018



Refresher Training Suspensions

FY18 R9 SUSPENSION LIFT SCHEDULE

* To appear on the Suspension Lift Report, cardholder must complete the training by **11:59 PM ET**.

** A cardholder's account will be active **two to five business days** after CCSC's lift request submission to US Bank.

Training Due for Suspension Lift*	Suspension Lift Report	Card Active Date** (no later than)
16 May 2018	18 May 2018	25 May 2018
23 May 2018	25 May 2018	1 Jun 2018
30 May 2018	1 Jun 2018	8 Jun 2018
6 Jun 2018	8 Jun 2018	15 Jun 2018
13 Jun 2018	15 Jun 2018	22 Jun 2018
20 Jun 2018	22 Jun 2018	29 Jun 2018
30 Jun 2018	30 Jun 2018	6 Jul 2018



Refresher Training Suspensions

NEW SUSPENSION PROCESS

- On Monday, May 14, 2018, CCSC will place in Access Online a R9 status on the accounts of purchase cardholders with outstanding refresher training.
 - To avoid a suspended card, cardholders must complete the refresher training by **11:59 pm ET, Sunday, May 13, 2018.**
- Only CCSC will forward suspension lifts to US Bank.
 - R9 suspension lift process is similar to S1 suspension lift process.
- Cardholder's account will be active two to five business days after CCSC's request submission to US Bank.



Frequently Asked Questions

■ How do I obtain a copy of today's webinar presentation?

- The presentation *Requirements and Tracking for the USDA Purchase Card Annual Refresher Training* is available through the following channels:
 - View today's webinar in the Outlook meeting invitation;
 - Send an email to the CCSC Inbox or your agency's APC requesting the presentation;
 - Download the presentation from the CCSC website;

■ How does the CCSC know if a participant has completed the refresher training?

- If a program participant has successfully completed the FY18 CCSC Purchase Card Annual Refresher Training(s), then AgLearn will report that the participant has completed the training requirement for FY18. The CCSC receives a report of all participants who have successfully completed the refresher training modules.



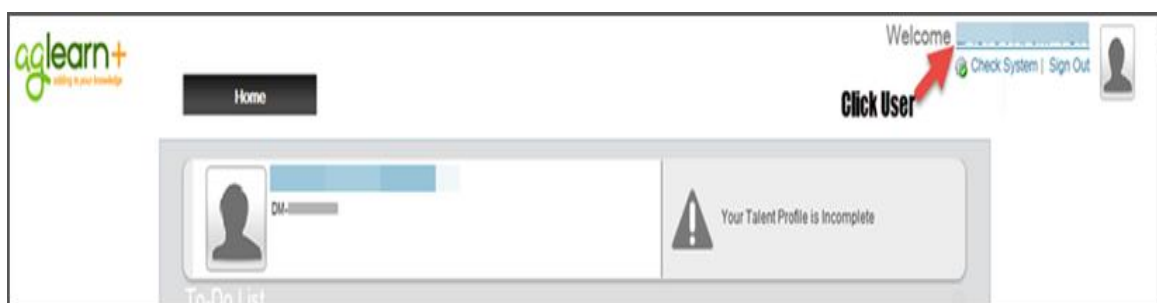
Frequently Asked Questions

- **Some AOs and Coordinators are also Cardholders. Which refresher training course should they complete?**
 - Program participants who play dual roles (Cardholder and AO, LAPC or APC) are required to complete both the cardholder refresher training and the course corresponding to their second program role. The corresponding courses are listed below.
 - Cardholders: FY18 USDA Purchase Card Program Refresher Training for Cardholders (*Web Based DM-PC-CARDHOLDERS-2018*) * *FY18 USDA Purchase Card Program Refresher Training - Policy*
 - Approving Officials: FY18 USDA Purchase Card Program Refresher Training for Approving Officials (*Web Based DM-APPROVING-OFFICIALS-2018*) * *FY18 USDA Purchase Card Program Refresher Training - Policy*
 - Coordinators (APCs and LAPCs): FY18 USDA Purchase Card Program Coordinator Refresher Training for Coordinators (*Web Based DM-PC-COORDINATORS-2018*) * *FY18 USDA Purchase Card Program Refresher Training - Policy*



Frequently Asked Questions

- Program participants have successfully completed the course and have a certificate of completion. The CCSC tracking report does not show the participants' status as complete. How do I change these participants' status to complete?
 - To change the status, please forward the information below to the CCSC.
 - Participant Full Name, Email Address and Role
 - Participant Certificate of Completion
 - Participant AgLearn User ID
 - AgLearn home page > Click User Name > Employee Information > User ID



Frequently Asked Questions

- **An individual is identified as a program participant; however, the person is no longer with the Purchase Card Program. How do I remove the person from the refresher training list?**
 - Cardholders
 - Obtain the Cardholder Destruction Form from the LAPC and set the Cardholder account status to **T9**.
 - AOs and Coordinators
 - Maintain the individual's Access Online (AXOL) User ID by setting the status to **"To Be Removed"**.

- **Will Continuous Learning Points (CLPs) be issued for completing these courses?**
 - Yes, one (1) CLP is issued towards applicable certification(s) when below occurs.
 - Coordinators and cardholders are warranted.
 - The training is successfully completed by passing the final exam.
 - AgLearn issues the course completion certificate.



Frequently Asked Questions

- **A program participant is on extended leave and will return after March 31, 2018. Will that individual be excused from the refresher training requirement?**
 - Program participants must complete the refresher training prior to June 30, 2018. Otherwise, participants are required to take the full complement of training for their role to be an active program participant.
- **If a cardholder, AO or coordinator completed the initial required Purchase Card training in FY18, then is the FY18 refresher training required?**
 - If a participant entered the Purchase Card Program on or after October 1, 2017, (purchase card open date or User ID creation date), then the participant is not required to take the FY18 refresher training.
 - The individual's name will not appear on the CCSCs list of program participants required to take the FY18 refresher training.



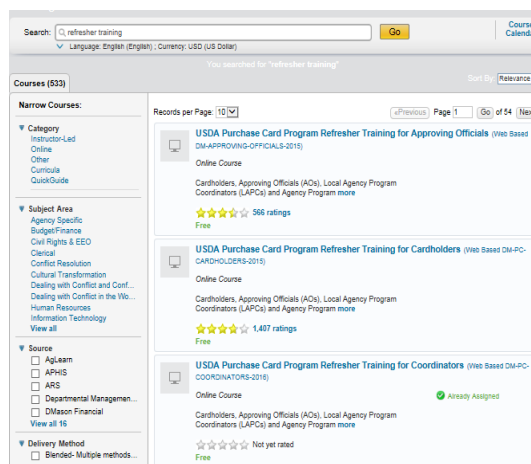
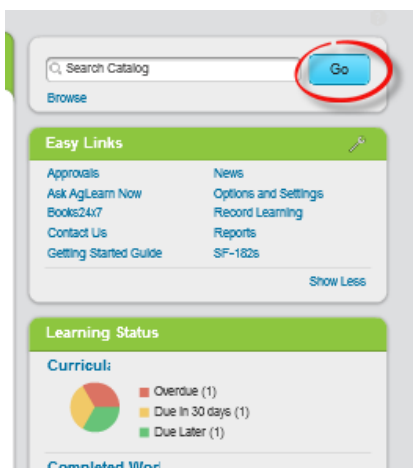
Frequently Asked Questions

- **A participant states that he or she does not have system access to complete refresher training. Is there a PDF version for completion of the training?**
 - USDA's Purchase Card Program requires all participants to have internet access to fulfill their roles. Internet access means that program participants also have access to AgLearn and are able to complete the online training.
 - A PDF version will be available in AgLearn. However, the PDF does not contain the quiz questions and does not produce a completion certificate.
- **What happens to Cardholders, Approving Officials and Coordinators who have outstanding refresher training after June 30, 2018?**
 - On July 2, 2018, APCs will take the appropriate action upon program participants with outstanding FY18 refresher training.
 - APCs will evaluate each program participant's need to belong in the program and determining the appropriate steps, including terminating purchase cardholder accounts and placing "To Be Removed" status on the User IDs of approving officials and coordinators.



Frequently Asked Questions

- **I am unable to find the FY18 CCSC Purchase Card Annual Refresher Training courses in the system. Are the refresher trainings available in AgLearn?**
 - Program participants can search AgLearn for the training using the actual title for the FY18 CCSC Purchase Card Annual Refresher Training.
 - The steps to find a particular training course are listed below.
 1. Select the “Go” button from the AgLearn home page.
 2. Leave the “Search Catalog” field blank.
 3. Enter the training title into the “Search” field.
 4. Select the “Go” button; then select the training title from the search results.



Frequently Asked Questions

- **Are the CCSC Purchase Card Refresher Trainings assigned to our AgLearn accounts?**
 - The refresher trainings for cardholders, approving officials and coordinators were assigned to each participant's AgLearn account prior to the training's availability.
- **Will the FY18 Refresher Training be removed?**
 - On July 3, 2018, the CCSC will request from the AgLearn the following:
 - Remove the FY18 Refresher Training modules in AgLearn; and
 - Un-assign all outstanding FY18 refresher training from pertinent AgLearn accounts.
- **Will waivers be granted to program participants so that they are not required to take the refresher training?**
 - No, all active program participants will be required to complete refresher training each fiscal year.



Frequently Asked Questions

- **Some FY18 due dates are listed as May. Are these due dates correct?**
 - Yes, the deadlines of May 14, 2018, and June 4, 2018, are correct. **PA No. 125: USDA Purchase Card Program – Mandatory, Annual Refresher Training Requirements** describes the deadlines. The PA description is listed below.
 - Thirty (30) business days after the March 31 deadline CCSC will suspend cardholder accounts of individuals not complying with the annual refresher training requirement. CCSC will provide APCs with the list of cardholder accounts that were suspended due to not complying with annual refresher training requirements. Accounts will be reactivated upon receipt of proof that the training has been successfully completed.
 - Forty-five (45) business days after the March 31 deadline, CCSC will provide the agencies' MASCOs and USDA senior leadership with a list of coordinators and AOs who have not met the annual refresher training requirements.
 - Unlike calendar days, business days do not include weekends and federal holidays. The business days extend the 30-day deadline to May 14, 2018, and the 45-day deadline to June 4, 2018.



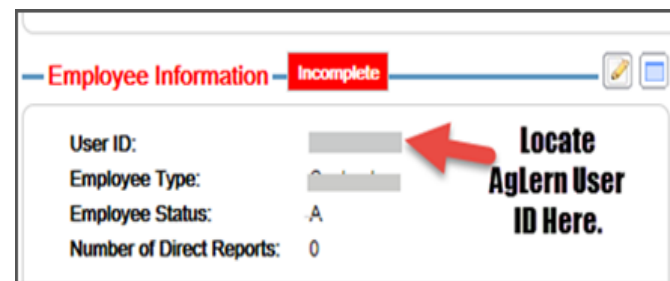
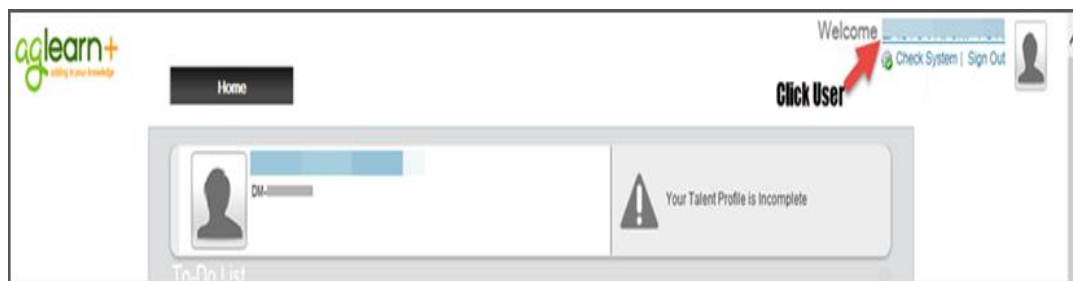
Frequently Asked Questions

- **I have APCs and LAPCs who occasionally serve as AOs. Are these individuals also required to complete the AO training?**
 - CCSC assigned each program participant the refresher training based upon the permissions or functional entitlement groups attached in Access Online to the individuals' User ID. If an APC or a LAPC does not have the AO permissions in Access Online, the APC or LAPC is not required to complete the AO training.
- **I have a suspended cardholder who has completed the training and needs to activate the card immediately. Can I request an unscheduled lift?**
 - CCSC will only provide US Bank with the accounts requiring a suspension lift per the dates in the [Suspension Lift Schedule on slide 11](#). CCSC will not honor requests for unscheduled lifts.



Frequently Asked Questions

- The CCSC program participant list identifies an individual whose AgLearn User ID cannot be found. Where can the AgLearn User ID be found?
 - Participant AgLearn User ID
 - AgLearn home page > Click User Name > Employee Information > User ID



- Submit the Participant Full Name, Email Address and Role along with the AgLearn User ID and CCSC will update the participant record.

Important Note



- CCSC will inform all program participants as soon as the trainings are available.
- The refresher trainings will be assigned to each participant's AgLearn account prior to the training's availability.

